

Fiduciary Survey

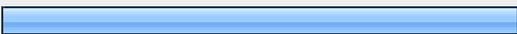
1. I am a:			Response Percent	Response Count
Licensed public fiduciary			23.8%	10
Licensed private fiduciary			76.2%	32
Licensed fiduciary employed by ADVS			0.0%	0
			<i>answered question</i>	42
			<i>skipped question</i>	0

2. If you are not a licensed fiduciary, please describe your role:		Response Count
		1
		<i>answered question</i>
		1
		<i>skipped question</i>
		41

3. How long have you been a licensed fiduciary?

	Response Percent	Response Count
1 – 2 years 	7.1%	3
3 - 4 years 	11.9%	5
5 – 7 years 	23.8%	10
8 – 10 years 	26.2%	11
10 - 15 years 	28.6%	12
15 – 20 years 	2.4%	1
20 years or over	0.0%	0
answered question		42
skipped question		0

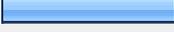
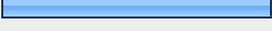
4. What designation best describes your position:

	Response Percent	Response Count
Principal 	78.6%	33
Estate Administrator 	4.8%	2
Attorney 	7.1%	3
Case Manager 	9.5%	4
Administrative Assistant	0.0%	0
Other	0.0%	0
answered question		42
skipped question		0

5. If you selected "other" in question number four, please write your title:

	Response Count
	1
<i>answered question</i>	1
<i>skipped question</i>	41

6. What is your highest level of education?

	Response Percent	Response Count
High School or Less 	7.1%	3
Vocational or Technical School	0.0%	0
Some College 	14.3%	6
Associates Degree 	11.9%	5
College Graduate 	26.2%	11
Graduate Degree 	40.5%	17
<i>answered question</i>		42
<i>skipped question</i>		0

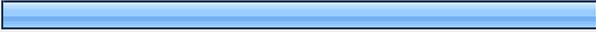
7. Do you hold any other professional licenses, qualifications, certifications, or designations (i.e. attorney, CPA, RN, etc.) beyond being a licensed fiduciary?

	Response Count
	28
<i>answered question</i>	28
<i>skipped question</i>	14

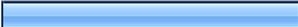
8. If you have specific expertise or qualifications, does that increase your billing rate for services?

	Response Percent	Response Count
Yes 	42.1%	16
No 	44.7%	17
Don't Know 	13.2%	5
answered question		38
skipped question		4

9. Are you employed:

	Response Percent	Response Count
Full-Time 	90.5%	38
Part-Time 	9.5%	4
answered question		42
skipped question		0

10. What county do you primarily practice in?

	Response Percent	Response Count
Apache	0.0%	0
Cochise	0.0%	0
Coconino 	4.8%	2
Gila 	2.4%	1
Graham	0.0%	0
Greenlee	0.0%	0
La Paz 	2.4%	1
Maricopa 	45.2%	19
Mohave 	7.1%	3
Navajo 	4.8%	2
Pima 	19.0%	8
Pinal 	4.8%	2
Santa Cruz	0.0%	0
Yavapai 	2.4%	1
Yuma 	7.1%	3
answered question		42
skipped question		0

11. How many employees work in the firm where you are employed?

	Response Percent	Response Count
1	19.0%	8
2 - 5	33.3%	14
6 - 10	33.3%	14
11 - 15	7.1%	3
16 - 20	7.1%	3
21 - 30	0.0%	0
30 or over	0.0%	0
answered question		42
skipped question		0

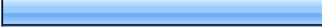
12. How are fees organized and/or charged?

	Response Percent	Response Count
Fixed rates	9.8%	4
Hourly rates	80.5%	33
Percentages	0.0%	0
Other (Please explain in question #13)	9.8%	4
answered question		41
skipped question		1

13. If your answer for question 11 is "other" please explain:

	Response Count
	5
<i>answered question</i>	5
<i>skipped question</i>	37

14. What is the hourly rate for the principal licensed fiduciary (for fiduciary work only, please)?

	Response Percent	Response Count
\$40.00 - \$59.99 	10.3%	4
\$60.00 - \$79.99 	12.8%	5
\$80.00 - \$99.99 	15.4%	6
\$100.00 - \$125.00 	48.7%	19
\$125.00 - \$150.00 	10.3%	4
\$150.00 - \$175.00	0.0%	0
\$175.00 - \$200.00	0.0%	0
\$200.00+ 	2.6%	1
Don't Know	0.0%	0
<i>answered question</i>		39
<i>skipped question</i>		3

15. What is the hourly rate of other licensed fiduciaries in the office(for fiduciary work only, please)?

		Response Percent	Response Count
Not applicable		48.7%	19
\$40.00 - \$59.99		7.7%	3
\$60.00 - \$79.99		5.1%	2
\$80.00 - \$99.99		20.5%	8
\$100.00 - \$125.00		15.4%	6
\$125.00 - \$150.00		2.6%	1
\$150.00 - \$175.00		0.0%	0
\$175.00 - \$200.00		0.0%	0
\$200.00+		0.0%	0
Don't Know		0.0%	0
answered question			39
skipped question			3

16. What is the hourly rate range of support staff in the office?

	Response Percent	Response Count
Don't know (I am a staff member, not the principal)	8.6%	3
\$20.00 - \$49.99	22.9%	8
\$50.00 - \$69.99	28.6%	10
\$70.00 - \$89.99	37.1%	13
\$90.00 - \$99.99	0.0%	0
\$100.00+	2.9%	1
Don't Know	0.0%	0
answered question		35
skipped question		7

17. What is the hourly rate for filing:

	Response Percent	Response Count
\$0	35.9%	14
\$20.00 - \$49.99	25.6%	10
\$50.00 - \$69.99	12.8%	5
\$70.00 - \$89.99	15.4%	6
\$90.00 - \$99.99	2.6%	1
\$100.00+	2.6%	1
Don't Know	5.1%	2
answered question		39
skipped question		3

18. What is the hourly rate for processing mail:

		Response Percent	Response Count
\$0		33.3%	13
\$20.00 - \$49.99		28.2%	11
\$50.00 - \$69.99		10.3%	4
\$70.00 - \$89.99		15.4%	6
\$90.00 - \$99.99		2.6%	1
\$100.00+		5.1%	2
Don't Know		5.1%	2
answered question			39
skipped question			3

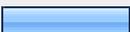
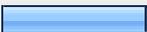
19. What is the hourly rate for shopping:

		Response Percent	Response Count
\$0		11.1%	4
\$20.00 - \$49.99		47.2%	17
\$50.00 - \$69.99		13.9%	5
\$70.00 - \$89.99		19.4%	7
\$90.00 - \$99.99		2.8%	1
\$100.00+		0.0%	0
Don't Know		5.6%	2
answered question			36
skipped question			6

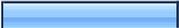
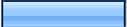
20. What is the hourly rate for preparing accounts:

	Response Percent	Response Count
\$0 	7.7%	3
\$20.00 - \$49.99 	7.7%	3
\$50.00 - \$69.99 	15.4%	6
\$70.00 - \$89.99 	23.1%	9
\$90.00 - \$99.99 	17.9%	7
\$100.00+ 	17.9%	7
Don't Know 	10.3%	4
answered question		39
skipped question		3

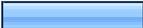
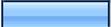
21. What is the hourly rate for writing checks:

	Response Percent	Response Count
&0 	18.9%	7
\$20.00 - \$49.99 	5.4%	2
\$50.00 - \$69.99 	27.0%	10
\$70.00 - \$89.99 	21.6%	8
\$90.00 - \$99.99 	8.1%	3
\$100.00+ 	10.8%	4
Don't Know 	8.1%	3
answered question		37
skipped question		5

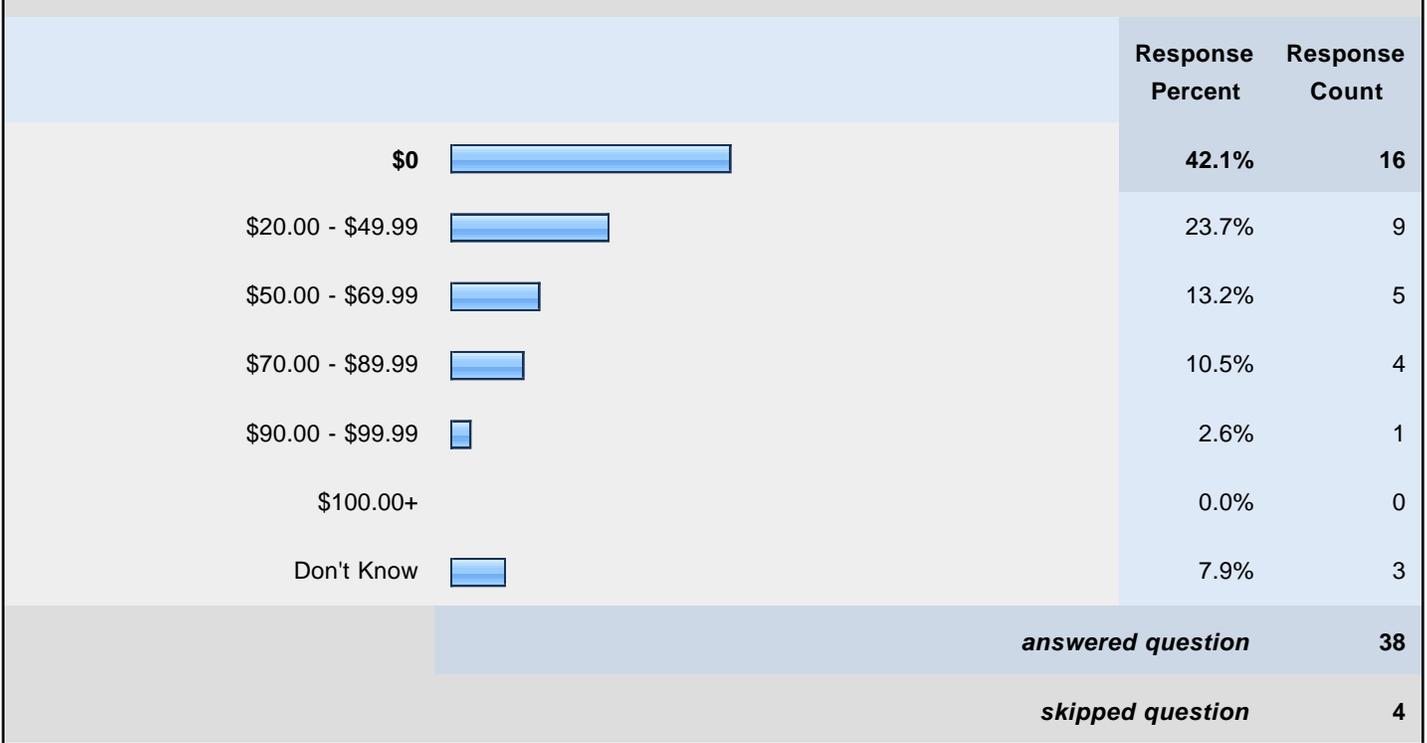
22. What is the hourly rate for reviewing accounts payable:

	Response Percent	Response Count
\$0 	10.5%	4
\$20.00 - \$49.99 	7.9%	3
\$50.00 - \$69.99 	26.3%	10
\$70.00 - \$89.99 	18.4%	7
\$90.00 - \$99.99 	13.2%	5
\$100.00+ 	15.8%	6
Don't Know 	7.9%	3
answered question		38
skipped question		4

23. What is the hourly rate for inventorying assets:

	Response Percent	Response Count
\$0 	2.6%	1
\$20.00 - \$49.99 	13.2%	5
\$50.00 - \$69.99 	13.2%	5
\$70.00 - \$89.99 	21.1%	8
\$90.00 - \$99.99 	26.3%	10
\$100.00+ 	15.8%	6
Don't Know 	7.9%	3
answered question		38
skipped question		4

24. What is the hourly rate for making photocopies:



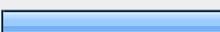
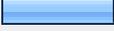
25. What is the hourly rate for scanning documents:



26. Do you carry professional liability insurance?

	Response Percent	Response Count
Yes 	59.5%	25
No 	31.0%	13
Don't Know (I am staff) 	9.5%	4
<i>answered question</i>		42
<i>skipped question</i>		0

27. What is the annual cost of the professional liability insurance (please skip if you do not have liability insurance, or of you do not know the answer to this question)?

	Response Percent	Response Count
\$0.00 - \$1,999.99 	33.3%	8
\$2,000 - \$3,999.99 	29.2%	7
\$4,000 - \$5,999.99 	20.8%	5
\$6,000+ 	16.7%	4
<i>answered question</i>		24
<i>skipped question</i>		18

28. What is the amount of coverage provided?

	Response Count
	21
<i>answered question</i>	21
<i>skipped question</i>	21

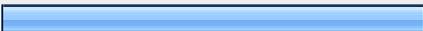
29. If you are a private fiduciary, what is the aggregate value of the bonds you currently carry?

	Response Percent	Response Count
\$0.00 - \$499,999 	26.7%	8
\$500,000 - \$1,499,999 	23.3%	7
\$1,500,000 - \$2,499,999 	20.0%	6
\$2,500,000 - \$3,499,999 	3.3%	1
\$3,500,000+ 	26.7%	8
<i>answered question</i>		30
<i>skipped question</i>		12

30. Are you a member of the National Guardianship Association?

	Response Percent	Response Count
Yes 	59.5%	25
No 	40.5%	17
<i>answered question</i>		42
<i>skipped question</i>		0

31. Are you:

	Response Percent	Response Count
National Certified Guardian 	33.3%	13
Master Certified Guardian 	2.6%	1
None of the above 	64.1%	25
<i>answered question</i>		39
<i>skipped question</i>		3